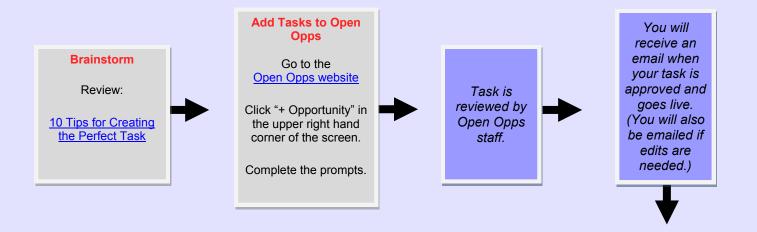
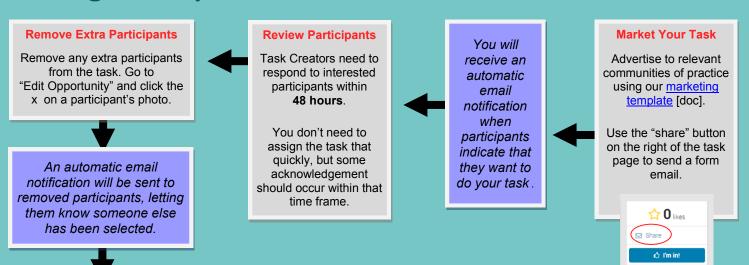


# **Task Creation Process**

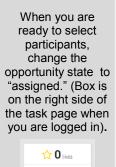
## **Preparation**



### **Getting Participants**



## **Wrapping Up**



**Assign Task** 



Automatic email sent to participants, signifying their selection. You will be CC'd.

Be sure you removed extra participants or they will also receive the "you've been assigned" email!

#### **Task Editing**

Make edits if the task changes after posting.

If you are going to be out of the office, choose a colleague to be a replacement task creator (you can switch task creators anytime) or put your open task back into "draft" via the opportunity state box.

#### **Task Archiving**

If your task is not picked up within a needed timeframe, change the opportunity state to "archived."

For example, if your task needs to be done by Mar. 3rd, and nobody selects it, change the status to "archived" on Mar. 4th.

#### **Closing Tasks**

If your task has been completed, change the opportunity state to "completed."

Thank you for being a task creator!!